

Knowledge Transfer Checklist

This Checklist contains a series of questions designed to help Agency employees identify their critical knowledge, records and expertise that should be implemented on an ongoing basis. It is intended to pair with ELN's Knowledge Transfer Menu (Menu), which is envisioned to contain recommendations and/or best practices for transferring knowledge critical to maintaining the Agency's continuity of operations.

1. Have I transferred my contacts?
The Menu contains ideas on types of contacts to consider, what information about your contacts could be useful and where information about your contacts should be stored.
2. Have I organized and created a description of how and where I have stored my paper files?
The Menu contains examples of types of paper files that might be useful or mandatory to keep, as well as records retention requirements, and ideas on where to locate and how to organize these files.
3. Have I organized and recorded how and where I have stored my electronic files?
The Menu contains examples of types of electronic files that might be useful or mandatory, as well as records retention requirements to keep and ideas on where to save and how to organize these files.
4. Have I created and centrally located Standard Operating Procedures for my critical job functions?
The Menu contains examples of SOPs and where to store your SOPs.
5. Have I recorded and centrally located a list of recommended training and other resources for my critical job functions?
The Menu contains ideas for passing on recommendations and other resources that helped you to be successful in your current position.
6. Have I recorded or transferred knowledge about my current and/or legacy projects?
The Menu contains ideas on how to record the status of current and the legacy of past work projects.
7. Have I recorded or transferred historical Agency knowledge?
The Menu contains examples of important historical Agency knowledge and ideas on how to record or verbally transfer this knowledge.
8. Have I recorded and centrally located regulatory citations, case history, and/or any other information critical to my job functions?
The Menu contains examples of critical regulatory information and case histories, and ideas on how to transfer this knowledge.
9. Have I recorded or transferred knowledge about how to effectively promote an idea?
The Menu discusses ideas on how to record information on briefing up, examples of organizational savvy, promoting ideas in your unit/team/office, within your Region and among your external contacts.
10. Are there any other human resources and/or management requirements that I need to complete prior to leaving my position?
Speak to your HR representative and management chain to ensure you have met their expectations.